

Appendix D5: Existing Customer – New Case – 3rd Party

<u>Applet Field Name</u>	<u>Logical Field Name</u>	<u>Smartsript Question Name</u>	<u>Question Text</u>	<u>Pick Applet</u>	<u>Notes</u>	<u>Required Field?</u>
N/A	N/A	Master Greeting	* Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is [Agent Name]. Is this your first time calling our office?	N/A		Y
N/A	N/A	Master Existing Case?	Are you calling about an existing case?	N/A	Answer = NO	Y
N/A	N/A	SR Master Link	[NOTE: Press Enter.]	N/A		N
N/A	N/A	Goodbye Q0	[NOTE: Are you speaking with the borrower?]	N/A	Answer = NO	Y
Case Last Name	Contact Last Name	SR Last Name	[NOTE: Press F2. Search for the account with the borrower's SSN. Then, add the third party as a contact for the case] May I please have the borrower's social security number?	SR Contact Pick Applet		Y
N/A	N/A	SR Verify First Name-Borrower	NOTE: You have selected [First Name] [Last Name] as the Third Party Contact. If this is correct, press Enter. If this is incorrect, click on the question above and press F2 to reselect.	N/A		Y
N/A	N/A	SR Master Link	[NOTE: Press Enter.]	N/A		N
Original Issue Summary	Original Issue Summary	SR Profile Info	How may I help you today? [NOTE: Type caller's problem.]	N/A		Y
Original Issue Category	Version	SR Area Of Problem	[NOTE: Select Issue Category.]	SR Area Pick Applet		Y
Original Issue Sub-Category	Severity	SR Error Detail	[NOTE: Select Issue Sub Category.]	SR Sub-Area Hierarchical Pick Applet		Y

N/A	N/A	Loan Lead in	OK, I'd like to get a little more information on your loan please.	N/A		Y
Loan Type	Product	Loan Type	* What type of loan do you have?	SR Internal Product Pick Applet		Y
Svc Agency	Servicing Agency	Loan Servicer	* Who holds your loan?	OCTS Contact Type Pick Applet		Y
Loan Status	Loan Status	Loan Status	* What is the current status of your loan?	OCTS Contact Type Pick Applet		N
N/A	N/A	SR Resolution of Problem	Hold for a moment while I search for further information on [Area] in the database.	N/A		N
N/A	N/A	SR Decision Issue	[ExistText][Explanation].	N/A		N
N/A	N/A	SR Decision Issue How to Discuss	[ExistText] [Discuss]	N/A		N
N/A	N/A	Goodbye Q1	[NOTE: Can you resolve the issue now?]	N/A	If "NO", goto Goodbye Q3. If "YES", goto Goodbye Q2.	Y
N/A	N/A	Goodbye Q3	Now that I have taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling. [NOTE: Press Enter twice to end the script and provide caller with case number.]	N/A		N

N/A	N/A	Goodbye Q2	[NOTE: Go to the Cases Tab, Results Search View and add a result for this case. Then, close the case. Press Enter twice to end the script.]	N/A		N
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